TSW WEALTH MANAGEMENT

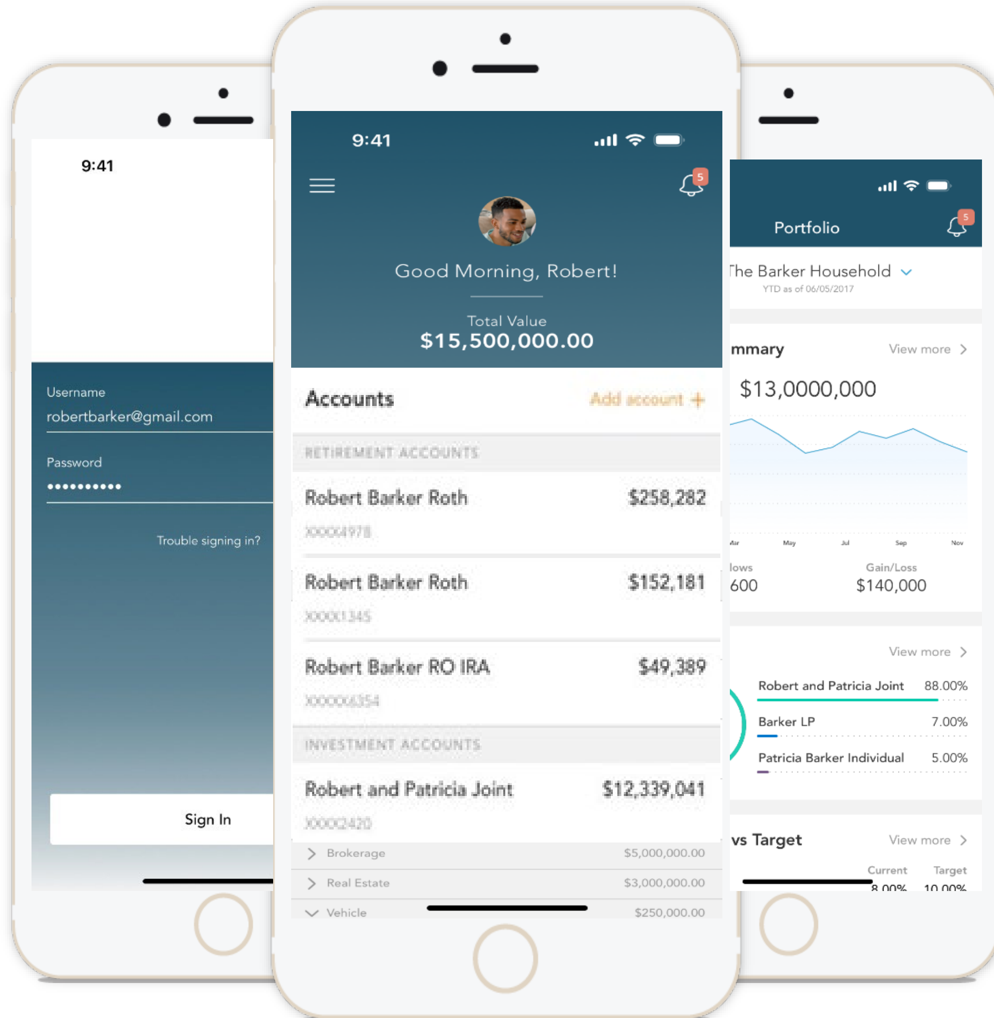
Welcome to your Mobile App

Personalized For You

From your phone or tablet you have:

- Fast access to your accounts and activity detail
- Easy to read overview of your balances
- Access to your performance reports and brokerage statements
- Ability to securely send/receive documents
- Quick access to call or email our office right from the app

…and more!



TSW WEALTH MANAGEMENT

Stay Connected to Your Financial Picture

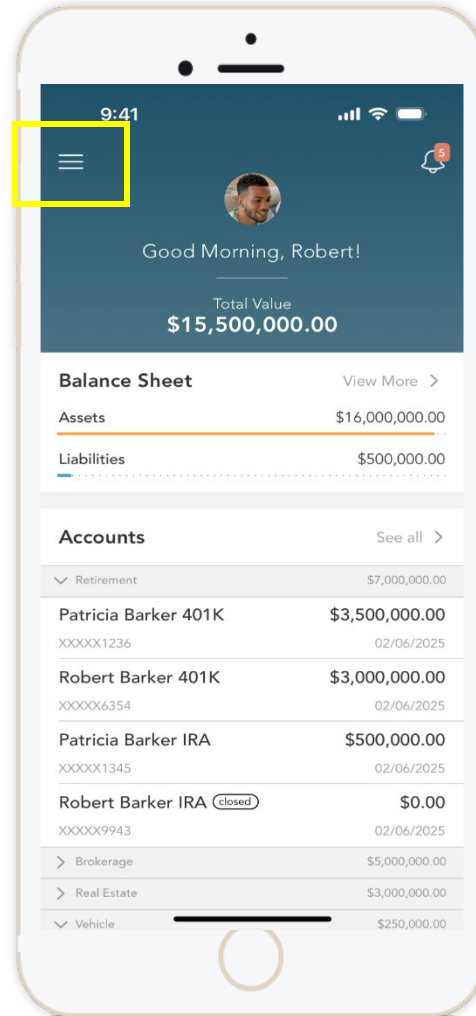
Home Page	At-a-glance view of your overall portfolio
Accounts	Detailed list of your accounts
Portfolio	Dynamic view of your assets, allocation, and activity
Vault	Securely share and organize your important financial documents
Team	Contact your wealth management team with one click
App Download	Download the mobile app and get started

Home Page

When you log in, you'll see your personalized home page. The **menu** at the top left gives you quick access to the other pages of your portal.

Your accounts and total portfolio value are listed front and center. After your accounts, you'll also find your top holdings for quick reference.

You can stay connected to your financial team with clickable links to phone numbers and emails.



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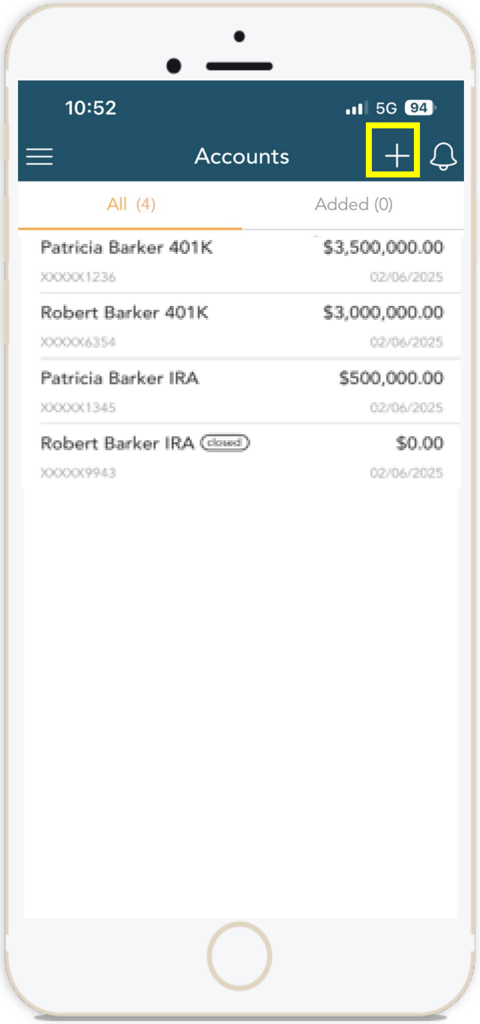
Accounts

The Accounts page provides a detailed list of your accounts with the ability to aggregate and manage outside accounts or manual accounts.

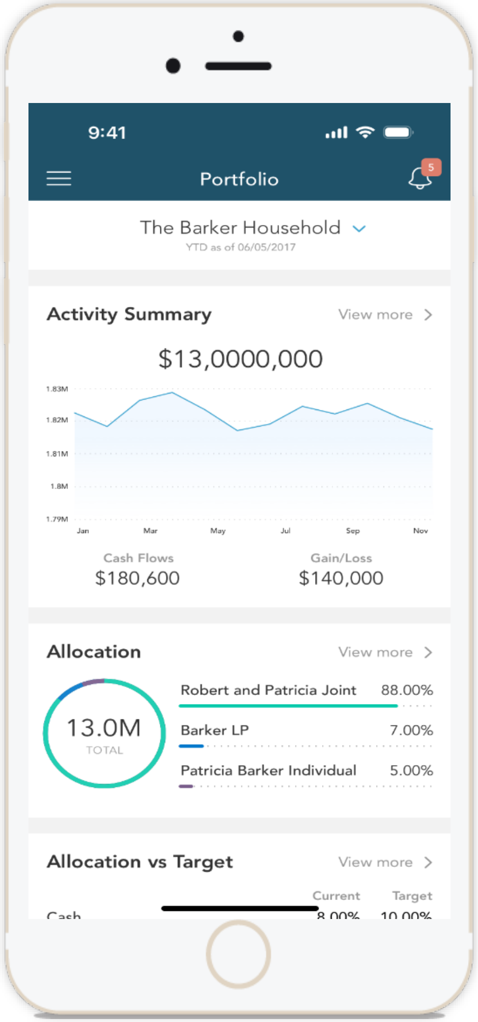
- Balances are viewable at a glance.
- Expand each account to see your holdings, account details, and activity.
- Click “+” to add outside accounts to view your entire financial picture from one secure location.



Portfolio

The Portfolio dashboard is where you can view additional details and analytics about your portfolio.

- The dashboard gives you a dynamic overview of your portfolio with various performance highlights.
- For more detail, you can click on the title of each section or the “view more” option on each card.
- Customize your view using the filter features to select specific date ranges or accounts.



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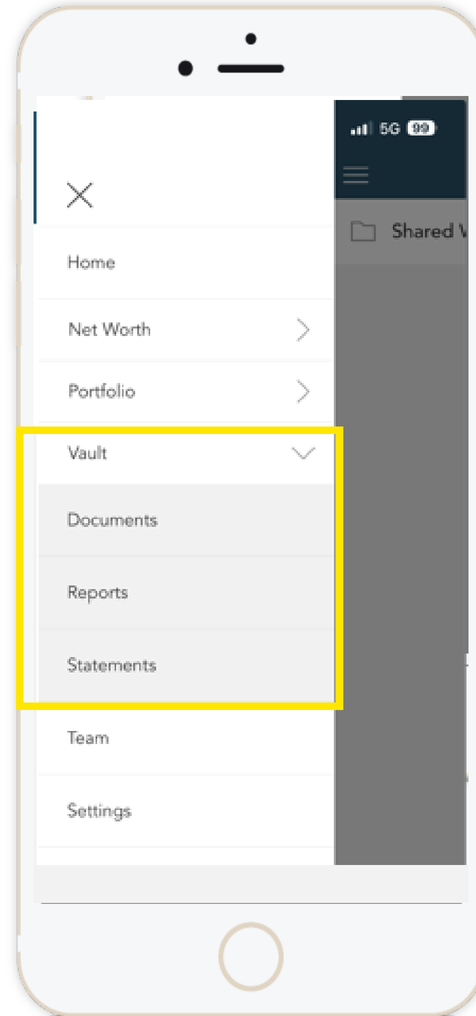
Vault

Securely sharing documents is key to working with your wealth management team.

From the Vault menu, you easily access and organize important financial reports and documents:

- Documents: Where we can share documents with each other
- Reports: View your Advisory Quarterly & YTD Performance Reports
- Statements: View your Advisory Brokerage Statements



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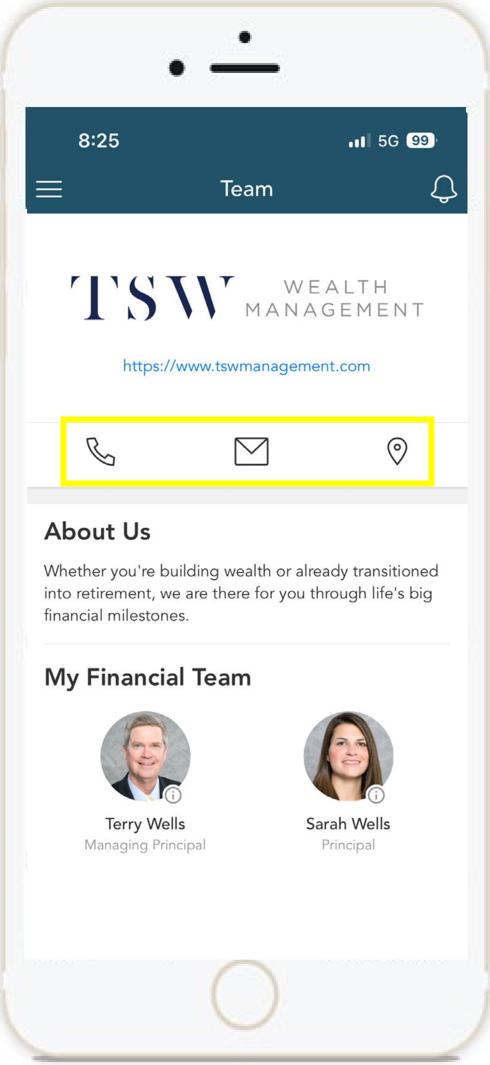
Team

Use the Team page to view your advisory and client service teams, and communicate directly from the app.

- Call our office directly from your mobile device
- Email a member of your wealth management team with a single click
- Use the Map feature to locate our office



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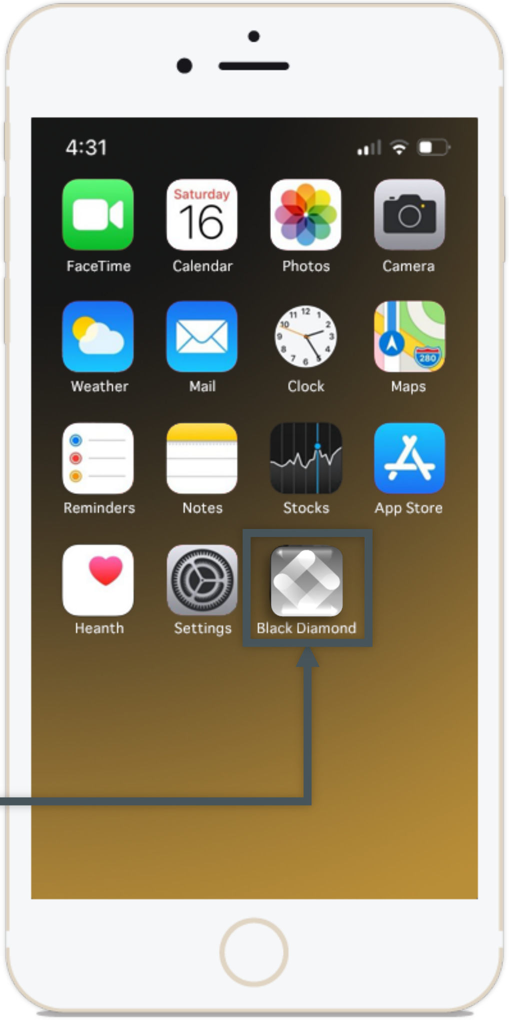
Mobile Application

To get started, download the free Black Diamond app from the Apple App Store or Google Play.



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Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

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If you have any questions, please contact us.
We are here to help.

TSW Wealth Management
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